

DEPARTMENT OF LOCAL GOVERNMENT FINANCE (DLGF)
2002 TRAINING AND
CONTINUING EDUCATION
(REVISED 1/02/02)

Department of Local Government Finances' Statutory Responsibilities

Overview of Certification & Continuing Education Requirements:

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New Official Training

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DEPARTMENT OF LOCAL GOVERNMENT FINANCE (DLGF)
STATUTORY RESPONSIBILITIES

In addition to applying and interpreting the various property tax laws of this state, the Department of Local Government Finance (DLGF), formerly the State Board of Tax Commissioners, is required to provide training to county, township, and township-trustee assessors and members of the county property tax assessment boards of appeals (See IC 6-1.1-35.2-1). Moreover, Indiana law also requires the DLGF to: a) provide training for newly elected assessing officials; and b) continuing education training for all assessing officials. As provided in IC 6-1.1-35:

New Official Training: "In any year in which an assessing official, a county assessor, or a member of a county property tax assessment board of appeals takes office for the first time, the Indiana Department of Local Government Finance *shall* conduct training sessions determined under the rules adopted by the Indiana Department of Local Government Finance under IC 4-22-2 for these new officials. These sessions must be held at sufficient convenient locations throughout Indiana." (See IC 6-1.1-35.2-2)

Continuing Education Training: "Each year the Indiana Department of Local Government Finance *shall* conduct the continuing education sessions required in the rules adopted by the Indiana Department of Local Government Finance for all assessing officials, county assessors, and all members of, and hearing officers for, the county property tax assessment board of appeals. These sessions must be conducted at sufficient convenient locations throughout Indiana." (See IC 6-1.1-35.2-3)

OVERVIEW OF CERTIFICATION & CONTINUING EDUCATION
REQUIREMENTS

Background

In 1997, the Indiana General Assembly mandated the Tax Board to adopt rules concerning assessor certification, continuing education requirements, and disciplinary action(s) for failure to comply with such laws and rules. As provided in HEA 1783 (1997), the Tax Board shall adopt rules to set:

- (1) minimum training requirements for certification after December 31, 1998, under this chapter;
- (2) continuing education requirements for the renewal of a certification after December 31, 1998, under this chapter; and

- (3) procedures for renewing a certification issued under this chapter, including a certification issued before January 1, 1999, for a person who meets the certification requirements set under subdivision (2)."

The State Tax Board is require to:

"...establish procedures for disciplinary action against a certificate holder that fails to comply with the statutes or rules applicable to the certificate holder."

Certification/Continuing Education Rule

In 2000, the continuing education certification cycle for Level I and II certified assessor-appraisers was extended from **two to four years**. The SBTC rules on continuing education cycles (50 IAC 15-3-2 and 15-3-4) were amended by the board in October 2000 and were signed by the Governor and filed with the Secretary of State in December 2000. The amendment was published as a final rule in the February issue of the Indiana Register.

As a result of the amendment, those certified assessor-appraisers who began their cycle on January 1, 1999, will have two additional years in which to fulfill their continuing education requirements. Those who began their continuing education cycle on January 1, 2000, or thereafter, will have 48-months, from the beginning of their cycle, in which to accrue the appropriate number of hours.

Please note: The number of hours required of a Level I and II did not change, only the length of the time in which an individual has to accrue those hours has changed and also "tested" hours is no longer a requirement.

Level I Certification Requirements

With regard to Level I certification, individuals must fulfill the following three (3) requirements:

- (1) After December 31, 1999, individuals must complete six (6) hours of pre-exam course work designated by the DLGF.
- (2) Individuals must pass the Level I assessor-appraiser exam designated by the DLGF.
- (3) Individuals must fulfill the continuing education requirements established by the DLGF.

In other words, individuals who have a Level I assessor-appraiser designation prior to December 31, 1999, are not required to complete the pre-exam course work.

The certification requirements for the Level II assessor-appraiser certification are exactly the same, with the obvious exception being that individuals must pass the Level II exam designated by the DLGF. Likewise, individuals who have a Level II assessor-appraiser designation prior to December 31, 1999, are not required to complete the pre-examination course work.

Level I & II Continuing Education Requirements

In addition to the certification requirements, the DLFG also adopted continuing education requirements for both Level I and Level II assessor-appraisers (See Tables 1 & 2). In order to remain certified, Level I and Level II assessor-appraisers must complete a minimum number of course work, or continuing education, hours over a four-year period, often referred to as the "certification cycle." Level I assessor-appraisers must attend thirty (30) hours of continuing education, while Level II assessor-appraisers must attend forty-five (45) hours.

Table 1**Continuing Education Requirements, Level I Certified Assessor-Appraiser****Group One: Received Level I prior to December 31, 1998** **Hours**

Cycle #1:	January 1, 1999 - December 31, 2002	30
Cycle #2:	January 1, 2003 - December 31, 2006	30
Cycle #3:	January 1, 2007 - December 31, 2010	30
Cycle #4:	January 1, 2011 —————▶	30

Group Two: Receive Level I between Jan. 1-Dec. 31, 1999 **Hours**

Cycle #1:	January 1, 2000 - December 31, 2003	30
Cycle #2:	January 1, 2004 - December 31, 2007	30
Cycle #3:	January 1, 2008 - December 31, 2011	30
Cycle #4:	January 1, 2012 —————▶	30

Group Three: Receive Level I between Jan. 1-Dec. 31, 2000 **Hours**

Cycle #1:	January 1, 2001 - December 31, 2004	30
Cycle #2:	January 1, 2005 - December 31, 2008	30
Cycle #3:	January 1, 2009 —————▶	30

Table 2**Continuing Education Requirements, Level II Certified Assessor-Appraiser****Group One: Received Level II prior to December 31, 1998** **Hours**

Cycle #1:	January 1, 1999 - December 31, 2002	45
Cycle #2:	January 1, 2003 - December 31, 2006	45
Cycle #3:	January 1, 2007 - December 31, 2010	45
Cycle #4:	January 1, 2011 —————▶	45

Group Two: Receive Level II between Jan. 1-Dec. 31, 1999 **Hours**

Cycle #1:	January 1, 2000 - December 31, 2003	45
Cycle #2:	January 1, 2004 - December 31, 2007	45
Cycle #3:	January 1, 2008 - December 31, 2011	45
Cycle #4:	January 1, 2012 —————▶	45

Group Three: Receive Level II between Jan. 1-Dec. 31, 2000 **Hours**

Cycle #1:	January 1, 2001 - December 31, 2004	45
Cycle #2:	January 1, 2005 - December 31, 2008	45
Cycle #3:	January 1, 2009 —————▶	45

The DLGF also approves additional continuing education opportunities with other organizations and associations, including the Lincoln Land Institute, Appraisal Institute, the International Association of Assessing Officials, The Indiana Realtor Board, etc. and similar organizations.

The most notable change to the DLGF training was the replacement of the January conference. In its place, the DLGF has increased the number of continuing education contact hours from approximately eleven hours per individual per year to twenty-eight hours per individual per year. Given the number of continuing education hours required to maintain certification, it has been concluded that an annual state assessor's conference is not the most cost effective or efficient setting for assessors to meet their continuing education requirements.

Conclusion

In summary, the DLGF believes that the DLGF's new approach to training offers several advantages, including:

- the increase in the number of DLGF continuing education training offerings and contact hours;
- better meeting the varying needs of the assessors;
- multiple deliveries of the same course at most locations allow assessors to better serve their taxpayers by keeping their offices operational during continuing education courses; and
- the DLGF's training schedule is much more convenient and flexible for local assessors.

"2002" NEW OFFICIAL TRAINING

Each year, the State Board of Tax Commissioners (to be known after January 1, 2002 as the Department of Local Government Finance or DLGF) conducts training for newly elected and appointed assessing officials. In January of the year following a year in which the office of assessor is not on the ballot, the State Board/DLGF offers one session in Indianapolis, as is the case in 2002.

Who Should Attend?

As allowed under IC 6-1.1-35.2-2b, this training is for any assessing official in their first year of office. Therefore, any assessing official who: (1) takes office on January 1, 2002 or (2) took office after the 2001 session of New Official Training was held (January 2001) is eligible to attend.

Assessing official, as defined under IC 6-1.1-1-1.5, "means: (1) a township assessor, including a trustee assessor; or (2) a member of a county property tax assessment board of appeals." Therefore, newly elected or appointed county assessors, township assessors, trustee assessors and PTABOA members are asked to attend. In cases where the assessing official is unable to attend, a deputy may attend instead (see Per Diem section of this memo for restrictions placed on deputies).

Per Diem

According to IC 6-1.1-35.2-2b Sec. 2. (c), "any new assessing official, county assessor, or member of a county property tax assessment board of appeals who attends a required session is entitled to receive the per diem per session set by the state board[DLGF]...and a mileage allowance from the county in which the official resides." The state board/DLGF has determined that newly elected assessing officials are entitled to receive a per diem in the amount of two hundred dollars (\$200) and a mileage allowance from the county fiscal body. A certification will be provided for all attendees who complete the program.

Please Note: The Indiana Code does not allow for deputies to be eligible for reimbursement. Therefore, deputies attending this program will be reimbursed at the discretion of the county fiscal body. A certification will be provided for all attendees who complete the program.

Please Note: Attendees **will not** receive certification for the two hundred dollar per diem if they fail to attend the entire program.

Dates and Location:

January 29th, 30th and 31st, 2002
Indiana Government Center South Building
Training Center Room 5
Indianapolis, Indiana

Class Times: Class will begin at 9:00 a.m. on January 29th.

Continuing Education Consideration: For those individuals who have achieved status as a Level I or Level II Assessor-Appraiser, this program has been approved for 16 hours of continuing education credit. This course can also serve as pre-exam course work for the Level I and/or Level II Assessor-Appraiser Certification Examination.

Please Bring With You: You will need to bring the 2002 Real Property Assessment Guideline Book 1 and Book 2 along with the 2002 Real Property Assessment Manual, a calculator, notebook, pens/pencils and a highlighter to each session.

Registration Information: Registration information will be mailed to you in the near future. If you do not receive this information, or have any questions, please contact Ronnita Baker at (317) 233-0166.

Special Accommodations: The Indiana Government Center South Building is wheel chair accessible. However, if you need additional special accommodations, please notify Ronnita Baker at (317) 233-0166.

Please Note: For any assessing official who has been in office for more than one year, continuing education will be provided in February, April, August and October 2002. New officials are also welcome to attend the continuing education sessions. Registration information will be sent to you in the near future.

“2002” CONTINUING EDUCATION

As you may know, over the past several years, the DLGF has been striving to improve the quality of the education that we offer, as well as increase the number of available opportunities and the length of courses. In keeping with this trend, the DLGF is excited to announce the beginning of the “2002” Continuing Education Series. The topics, covered during the four sessions, are meant to provide you with a more in-depth exploration of concepts, which are fundamental to assessment in Indiana.

We’ve Changed Some Things

Since the DLGF is no longer conducting the State’s Assessors’ Conference, we will be offering four (4) sessions of continuing education instead of the normal three sessions that we have offered in the past. The sessions will continue to be structured to better meet your learning needs. ***In registering for classes, please remember that you may only attend one location per session.***

Additionally, the length of each session has been extended. In prior years, the DLGF offered three 3½ hour sessions at each location. Each session presented at each location (9 in all) will be seven hours long (including an hour for lunch).

Certification & Compensation

The DLGF will certify for the purpose of receiving compensation and mileage allowance all assessing officials, assessing office employees, and PTABOA members for attending continuing education classes. Additionally, these participants will be certified to receive \$25.00 for each session attended in addition to the mileage allowance. Determination of actual payment is made at the local level. Remember that you can only attend one class per session. Therefore, you could receive as much as \$100.00 in addition to the mileage allowance. ***Those employed in other offices (e.g., auditors, treasurers, etc.) will not be certified for compensation and mileage but will be granted continuing education credit hours.*** However, all Level 1 and 2 Certified Assessor-Appraisers in the state are welcome to register to attend.

How & When Do I Register?

Registration information is mailed to each assessing official’s office approximately six to eight weeks prior to the start of a continuing education session. If you do not receive registration information, and would like to register, please contact Ronnita Baker at (317) 233-0166. Please register in advance for each session. The deadline for submitting your registration for each session will be printed at the top of each registration form. Classes tend to fill quickly, so you are encourage to register early for the location and the date that you want to attend.

Please Remember...

Keep in mind that you can only register for one class per session. We hope that this year’s continuing education series proves to be both interesting and useful. We have worked very hard to improve the quality of the programs that you attend. Please feel free to call (317) 233-1168 if you have any comments or suggestions for further improving DLGF training programs. ***Questions related to registration can be directed to Ronnita Baker at (317) 233-0166.***

Special Accommodations: If you need additional special accommodations, please notify Ronnita Baker at (317) 233-0166.

DATES AND LOCATIONS OF THE "2002" CONTINUING EDUCATION

FIRST SESSION

February 6 th & 7 th	Goshen, Ramada Inn
February 7 th & 8 th	Huntington, Huntington College Haebacker Dining Commons
February 12 th , 13 th & 14 th	Valparaiso, Porter County Expo Center
February 14 th & 15 th	Lafayette, Radisson Hotel
February 19 th & 20 th	Terre Haute, Holiday Inn
February 21 st & 22 nd	Richmond, Holiday Inn
February 26 th & 27 th	Vincennes University Shake Library, LRC 167
February 28 th & 29 and March 1 st	Indianapolis, IGCS Training Center 5
March 5 th & 6 th	Scottsburg, Best Western

SECOND SESSION

April 2 nd & 3 rd	Huntington, Huntington College Haebacker Dining Commons
April 3 rd & 4 th	Goshen, Ramada Inn
April 9 th & 10 th	Indianapolis, IGCS Training Center 5
April 11 th & 12 th	Terre Haute, Holiday Inn
April 16 th & 17 th	Richmond, Holiday Inn
April 18 th & 19 th	Lafayette, Radisson Hotel
April 23 rd , 24 th & 25 th	Valparaiso Porter County Expo Center
April 25 th & 26 th	Vincennes University Shake Library, LRC 167
April 30 th and May 1 st	Scottsburg, Best Western

THIRD SESSION

August 13 th & 14 th	Huntington College Haebacker Dining Commons
August 15 th & 16 th	Lafayette, Radisson Hotel
August 20 th & 21 st	Terre Haute, Holiday Inn
August 22 nd & 23 rd	Richmond, Holiday Inn
August 27 th , 28 th & 29 th	Valparaiso Porter County Expo Center
August 28 th & 29 th	Goshen, Ramada Inn
September 3 rd & 4 th	Vincennes University Shake Library LRC 167
September 5 th & 6 th	Scottsburg, Best Western
September 10 th & 11 th	Indianapolis, IGCS Training Center 5

FOURTH SESSION

October 1 st & 2 nd	Huntington College Haebacker Dining Commons
October 3 rd & 4 th	Lafayette, Radisson Hotel
October 8 th , 9 th & 10 th	Valparaiso Porter County Expo Center
October 9 th & 10 th	Goshen, Ramada Inn
October 15 th & 16 th	Terre Haute, Holiday Inn
October 17 th & 18 th	Richmond, Holiday Inn
October 22 nd & 23 rd	Vincennes University Shake Library LRC 167
October 24 th & 25 th	Scottsburg, Best Western
October 29 th & 30 th	Indianapolis, IGCS Training Center 5

DIRECTIONS TO THE “2002” CONTINUING EDUCATION SITES

Huntington - Huntington College, Haebacker Dining Commons, (219) 356-6000 ext. 1000
2303 College Ave., Huntington, Indiana 46750

I-69 north to Indiana Road 5 (Warren Exit) follow this junction S.R. 224 & S.R. 5 (Bud's Fishing Hole). Drive straight and you will now be on Broadway (S.R. 5 will angle to the left).

Follow Broadway to Guilford (the college will be on your left and K-Mart will be on your right). Turn left on Guilford. Follow this to Lake Street and, turn left. Follow this two blocks and it will run into the Haebacker Dining Commons.

Valparaiso - Porter County Expo Center, (219) 464-0133
219 E. Division Road, Valparaiso, Indiana 46383

Northeast corner of State Road 49 and Division Road. One mile south of U.S. Highway 30.

Lafayette - Radison Hotel, (317) 447-0575 ext. 150
4343 S.R. 26 E., Lafayette, Indiana 47905

Jct. I-65 and S.R. 26 in Lafayette Indiana.

Terre Haute - Holiday Inn, (812) 232-6081
3300 U.S. 41 South, Terre Haute, Indiana 47802

I-70 West to U.S. Highway 41 South.
Holiday Inn is visible from interstate.

Scottsburg - Best Western, (812) 752-2212
Box 129, Scottsburg, Indiana 47170

Jct. I-65 & S.R. 56. Box 129

Goshen – Ramada Inn, (219) 533-9551
1375 Lincolnway East, Goshen, IN 46526

Located on US 33 West in Goshen

Vincennes - Vincennes University, Shake Library - LRC 167, (812) 888-4229 Vincennes University

I-70 West to 41 South. Take 41 South all the way to Vincennes. Executive Inn will be on your right. Turn right at the Inn then turn left onto Second Street. This will bring you onto the campus. The Student Union Building will be on your left. The Shake Library is then located directly across from the Student Union Building. At the Corner of Second and Indianapolis. Park behind the Student Union Building and walk across the street to the library.

Richmond - Holiday Inn, (765) 966-7511
5501 National Road East, Richmond, IN 47374

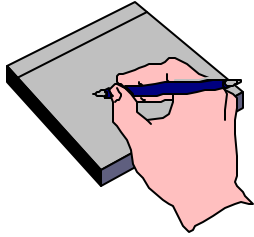
Interstate 70 East to Exit 156A. Turn South onto National Road East. Located on National Road East and US 40.

Indianapolis - Indiana Government Center South

If you are coming from the North, take I-65 South to the West Street exit. Follow West South to Ohio Street and turn left. Take Ohio Street to Capital Ave., turn right. Go to Washington Street and turn right. Get in the far left-hand lane and turn left at the second light, park in the first parking garage. Walk across the street to the Indiana Government Center South.

If you are coming from the East, take I-65 North to the West Street exit. Follow West Street South to Ohio street and turn left. Take Ohio Street to Capital Ave and turn right. Go to Washington Street and turn right. Get in the far left-hand lane and turn left at the second light, park in the first parking garage. Walk across the street to the Indiana Government Center South Building.

If you are coming from the West, take I-70 West to the West Street exit. Take West Street to Ohio Street and make a right. Immediately get into right-hand lane and turn right onto Capital Ave. Again, get in right-hand lane and turn right onto West Washington Street. Move to far left-hand lane and turn left at the second light, park in the first parking garage. Walk across the street to the Indiana Government Center South building. **Please note: If you arrive early, parking is available in the Washington street parking facility. If unable to park in the Washington street parking garage, on street parking is also available. If you choose to use the meters, please plan accordingly.**



Level I and Level II Prep Classes and Examinations

Due to the changes in the DLGF's training policy, the Level I and Level II prep classes will not be delivered in conjunction with the **2002** continuing education sessions. Please review the current schedule for the **2002** prep classes and the Level I and the Level II examinations. Due to the limited number of individuals registering for the prep classes and exams, all of the preparatory classes will be held in Indianapolis at the Indiana Government Center South Building. If the number of registrations rise, we will again hold prep classes in locations throughout the state.

Under Construction!

**At this time, the dates and locations for 2002
have not been scheduled.**

Level I Prep Class (9:00 AM until 4:30 PM Local Time)

Level II Prep Class (9:00 AM until 4:30 PM Local Time)

Level I Examination (Registration- 8:30 AM) and (Examination- 9:00AM until 1:00 PM Local Time)

Level I Examination (Registration- 8:30 AM) and (Examination- 9:00AM until 1:00 PM Local Time)

PLEASE NOTE: Registration information, directions and parking facilities for the Continuing Education, Level I & II preparatory classes and examinations can be obtained through our office by calling (317) 233-0166.



“2002” CONFERENCES

County/Township Assessors' Conference

The County Assessors' Association and the Indiana Assessors' Association Inc., combined conference will be held in Indianapolis at the Crowne Plaza and Omni Severin Hotel on **January 14th – 18th, 2002.**

Township Assessors' Conference

The Indiana Assessors' Association conference will be held in French Lick, Indiana at the French Lick Resort on **July 21st – 24^t, 2002.**

County Assessors' Conference

The County Assessors' Association conference will be held in Indianapolis at the Marriott Hotel located at 21st and Shadeland Ave on **August 5th – 9th, 2002.**

AIC (Association of Indiana Counties)

The Association of Indiana Counties conference will be held in Merrillville at the Star Plaza Hotel on **September 23rd – 26th, 2002.**

Indiana Township Assessors' State Convention (Township Trustee Assessors)

The Indiana Township Assessors' State Convention will be held in Indianapolis at the Omni Severin Hotel on **November 20th – 23^d, 2002.**

Reminder: Your individual assessor's associations will mail you the conference registration packets at a later date.